

-38-

CLAIMS

1. A method of establishing a computerised system for performing a task, including:

creating a list of actions ("action list") to be done by a practitioner in performing a task for storage on a computer;

creating a database of information relevant to the actions on the action list for storage on the computer;

providing means for associating the actions in the action list with the relevant information in the database;

providing file opening means for opening a file for the task to be performed;

providing means for creating a file action list in the file to be opened for the task to be performed corresponding to the action list; and

providing data input means for inputting data relevant to the actions to be done on the file action list.

2. A computerised method of performing a task, including:

selecting a list of actions to be done by a practitioner in performing a task from a plurality of lists of actions, each list of actions being associated with information in a database of information relevant to the actions on that list;

opening a file for the task to be performed and creating a file action list in the file corresponding to the selected action list; and

inputting data in the file relevant to the actions to be done on the file action list.

-39-

3. A method of establishing a computerised system for performing a plurality of tasks, including;

creating a plurality of lists of actions ("action lists") for storage on a computer, each action list including actions to be done in performing one or more of the tasks in the plurality of tasks;

creating a database of information relevant to the actions on the action lists for storage on the computer;

providing means for associating the actions in the action lists with the relevant information in the database; and

providing means for associating an action list with a task to be performed.

Preferably, the method also includes the following:

providing file opening means for opening a file for a task to be performed selected from the plurality of tasks;

providing means for creating a file action list in the file to be opened for the task to be performed corresponding to the action list for the selected task; and

providing data input means for inputting data relevant to the actions to be done on the file action list.

4. A computerised method of performing a task, including:

selecting a task to be performed from a plurality of tasks each task being associated with a list of actions to be done in performing that task ("action list"), each list of actions being associated with information in a database of information relevant to the actions on that list;

-40-

opening a file for the task to be performed and creating a file action list in the file corresponding to the action list for the selected task; and

inputting data in the file relevant to the actions to be done on the file action list.

5 Preferably, the method includes providing means for storing the data for retrieval whereby the actions which have been done can be viewed.

5. A method of establishing a computerised system for performing a plurality of tasks, including;

10 creating a list of tasks to be performed;

 creating a plurality of lists of actions ("action lists") for storage on a computer, each action list including actions to be done by a practitioner in performing a task;

15 creating a database of information relevant to each action to be done for storage on the computer;

 associating each action in the plurality of action lists with information in the database relevant to doing that action; and

20 providing means for accessing information in the database relating to an action to be taken.

6. A method of establishing a computerised system for performing a plurality of tasks, including;

 creating a list of tasks to be performed;

25 creating a plurality of lists of actions ("action lists") for storage on a computer, each action list including actions to be done by a practitioner in performing each of the tasks in the list of tasks ;

30 creating a database of information relevant to the actions in the action lists;

-41-

associating each action in the plurality of action lists with information in the database relevant to doing that action; and

5 providing modification means for modifying the lists of tasks, lists of actions and/or the information in the database.

7. A computerised method of performing a task including: displaying a checklist of actions to be done by the user to complete the task;

10 selecting one or more of the actions to be done to complete at least in part the task;

identifying one or more operations to be executed by reference to the action or to one or more other criteria;

entering data relevant to at least some actions and/or operations relevant to the doing or execution thereof; and

15 storing the data so entered whereby the user can check the extent to which actions and/or operations have been completed or executed in performing the task.

8. The method according to any one of Claims 1, 3, 5 or 6, wherein means are provided for arranging the file according to
20 a predetermined order.

9. The method according to Claim 8, wherein means are provided for arranging the file in any suitable order at the option of the practitioner.

10. The method according to any one of Claims 2, 4 or 7,
25 wherein means are provided for arranging the file according to a predetermined order.

-42-

11. The method according to Claim 10, wherein means are provided for arranging the file in any suitable order at the option of the practitioner.

12. A computer-based system operable for performing a task, including:

5 display means for displaying actions to be done or considered by a practitioner in performing a task to be performed;

database accessing means operably associated with the displayed actions for accessing information in a database
10 relevant to the actions displayed;

data input means operably associated with the displayed actions for entering data obtained by reference to the information in the database;

15 data storage means for storing data entered via the data input means; and

data retrieval means for retrieval of the data entered whereby actions which have been done and/or considered can be viewed.

13. A system according to Claim 12, wherein a front-end
20 interface is provided operable for interactive input by a user, the front-end interface providing a plurality of menu or command based entry points to a selection of practice modules each of which relates to a task.

14. A system according to Claim 13, wherein the front-end
25 interface provides for user identity input so that a plurality of users may use the system and/or method, and a plurality of action lists is provided for the user to select a task to be performed from a plurality of different tasks.

-43-

15. A system according to Claim 13 or Claim 14, wherein the front-end interface includes a log-in module operable to provide individual users with a log-in identity, suitably including a log-in password.

16. A system according to any one of Claims 13 to 15, wherein
5 the front-end interface operatively interacts with a practice management engine operable to call the front-end interface and professional practice modules.

17. A computer-based system for performing a task including:
a list of actions ("action list") to be done by a
10 user to perform a task to be performed, the action list being displayable on a computer screen;
data input means operatively associated with each action in the action list for input of data relevant to the action;
15 data storage means for storing data entered via the data input means for display with the action list whereby a user may check which actions have been done in performing the task.

18. A computer program for assisting a practitioner in
20 performing a task, including:
means for displaying actions to be done or considered by a practitioner in performing a task to be performed;
means for accessing information in a database relevant to the actions displayed;
25 means for entering data obtained by reference to the information in the database;
means for storing data entered via the data input means; and

-44-

means for retrieval of the data entered whereby actions which have been done and/or considered can be viewed.

19. Software for performing a plurality of tasks, including:

5 a database adapted to contain information relevant to actions to be done or considered in performing a plurality of tasks;

a file opening module operable to open a file for a task to be performed selected from the plurality of tasks;

10 a display module operable to display information from the database relevant to actions to be considered or done in performing the selected task;

a data input module operable to provide for the input of data relevant to the actions to be considered or done in performing the selected task; and

15 a data storage module for storing data in the file.

20. Software according to Claim 19, wherein the data in the file is stored in the database of information.

21. A method of performing a plurality of tasks including:

20 running a program on one or more computers so as to integrate software processes, the processes including:

a database process operable to store and retrieve information relevant to actions to be done or considered in performing a plurality of tasks;

25 a file opening process operable to open a file for a task to be performed selected from the plurality of tasks;

-45-

a display process operable to display information from the database relevant to actions to be considered or done in performing the selected task;

a data input process operable to provide for the input of data relevant to the actions to be considered or
5 done in performing the selected task; and

a data storage process for storing data in the file.

22. A method according to Claim 21, wherein the data storage process integrates the data in the file into the database of information.

10 23. A method according to Claim 21 or 22, wherein the processes further include a front-end interface operable for interactive input by a user, the front-end interface providing a plurality of menu or command based entry points.

24. A method according to any one of Claims 21 to 23, wherein
15 that the processes include a plurality of practitioner processes selectable from said entry points, each practice process relating to an action to be done in completing the task.

25. A method of modifying a master list of actions to be done by a practitioner in performing a task, the master list being
20 accessible by one or more users in a network of computers, including:

providing a database of information relevant to the actions on the master list stored on one or more of the computers in the network, the information being relevant
25 information in the database;

opening a file for the task to be performed and establishing a file action list corresponding to the master list in the file;

-46-

adding a modification to the file action list to
create a modified action list; and
saving the modification to the master action list.

26. A method according to Claim 25, and including the further
steps of selecting a choice from a group containing the options
5 of whether to make the modification to the file action list and
the master action list or only the file action list.

27. A computer based system for performing a task, including:
a database of information including a master list of
actions to be done or considered by a practitioner in
10 performing a task to be performed;
file opening means for opening a file for the task to
be performed and establishing a file action list
corresponding to the master list in the file;
data input means for inputting data for adding a
15 modification to the file action list to create a modified
action list; and
data storage means for storing the modification in
the master action list.

28. The system according to Claim 27, and including selection
20 means for selecting whether to store the modification in the
master action list or only the file action list.

29. A computerised method of performing a task including:
having an expert in a field prepare a list of actions
("action list") to be done in performing a task in that
25 field;
having the expert provide relevant information
associated with the actions on that list;

-47-

entering the list of actions and the information into a database; and

providing software operable to associate the information in the database with the actions to be done in performing the task.

5 30. A method of arranging information on a computer system relating to tasks to be performed by a practitioner, the method including:

providing a database including information required for performing a plurality of tasks;

10 creating an action list of actions to be done in performing each of the tasks to be performed;

operatively associating the information in the database with the actions to be done in performing each of the plurality of tasks.

15 31. The method according to any one of Claims 1 to 11, 21 to 26, 29 or 30 and including provision for tasks to be individualised and/or categorised.

32. The software according to Claim 19 or Claim 20, and including provision for tasks to be individualised and/or
20 categorised.

33. The system according to any one of Claims 12 to 18, 27 or 28 and including provision for tasks to be individualised and/or categorised.

34. A method according to Claim 31, software according to
25 Claim 32 or a system according to Claim 33, wherein the characterisation is customer based, and the individualisation is matter based, whereby a plurality of tasks may be performed for

-48-

a customer of the user, and individual tasks may be equated with a matter.

35. Software according to Claim 32 or Claim 34, wherein the processes are operable over a network of computers using distributed processing amongst one or more server computers and
5 one or more client computers operatively attached in a configuration suitable for the particular network about which the invention is installed.

36. Software according to any one of Claims 32, 34 or 35, wherein the software is operatively associated with normal server
10 side services to accommodate the execution of the method according to Claim 31 as a relational database having data tables relevant to customer information, user information, matter information and information relating to the action lists.

37. A method according to Claim 31 or Claim 34, software
15 according to Claim 32 or Claim 34 or a system according to Claim 33 or Claim 34, wherein the tasks are categorised into a range of kinds dependent on their intended usage.

38. The method, software or system according to Claim 37, wherein the kinds include client-based action lists usable on
20 client computers, article-based action lists for carrying out a task, and master action lists to which additional actions may be added by classes of users.

39. The method, software and system according to Claim 38, and including provision for users to make suggestions for changes
25 to be made to the master action list.

-49-

40. A method of establishing a computerised system for performing a task, including:

creating a list of actions ("action list") to be done by a practitioner in performing a task for storage on a computer;

5 creating an action database including information relevant to the actions on the action list for storage on the computer;

10 creating a subscribers database including information relevant to subscribers having access to the computerised system;

creating an information database including information ("professional information") relevant to a field of practice of the practitioner;

15 creating a publisher database including information relevant to publishers of professional information;

providing means for associating the actions in the action list with the relevant information in the database;

20 providing file opening means for opening a file for the task to be performed;

providing means for creating a file action list in the file to be opened for the task to be performed corresponding to the action list;

25 providing database access means for subscribers to subscribe to information contained in any one or more of the databases; and

providing data input means for inputting data relevant to the actions to be done on the file action list.